

The contracting process for Consultant Rotation List A&E contracts valued between \$25,000.00 and \$1,000,000.00 is as follows:

1. Project Manager (PM) requests the A&E Project Request Form from the Public Works Contracts (PWC) Consultant Services Coordinator (CSC). With the Project Request Form the CSC will email instructions regarding completion of the form. The PM will provide PWC with:
 - a. A completed A&E Project Request Form including a WBS or Internal Order number open to PWC,
 - b. The Scope of Services, and
 - c. Completed Human Resources (HR) Approval form with authorization signature from HR liaison.
2. Upon receipt of proper project intake documentation (see above), the CSC provides the names of five consultants from the City's Consultant Rotation List along with the Boiler Agreement, Contract Number (H#####), standard correspondence and forms. (If two contracts will be awarded, nine consultants will be provided. When three or more contracts will be awarded, three additional firms are provided for each additional contract.) NOTE: Any single agreement that exceeds \$1,000,000.00 must be awarded utilizing the RFP process and cannot use the Rotation List.
3. At the same time, the CSC requests three (3) EOCP requirements from the five consultants and provides an appropriate deadline. Upon receipt of the EOCP requirements the CSC reviews the requirements. The CSC informs the PM of the results of the review. Only those firms that pass the minimum requirements will be able to interview for the contract.
4. The CSC forwards the responsive requirements to EOCP. EOCP has ten calendar days to provide the PM with scores for the consultant firms.
5. The PM mails invitation to firms and schedules interviews.
6. The PM prepares interview script and ranking summary sheets.
7. The PM notifies Selection Panel of impending interviews.
8. The PM chairs the interview process and compiles the scores for each consultant interviewed.
9. The PM summarizes and verifies the scores of each consultant.
10. The PM prepares memorandum for the director's approval immediately following finalization of scores.
11. Upon receipt of the initiating department director's approval, PM notifies all participants of the results of the interview process and the selection by calling each proposer on the telephone. Proposers shall be notified that they are entitled to a debriefing session, upon their request, from the PM.
12. The PM, in accordance with the standard correspondence provided:
 - a. Mails notification to selected firm(s), and
 - b. Mails notification to non-selected firms.

13. Once the most highly qualified firm is identified and approved by the PM's director, the PM begins negotiations with the firm. If the PM is unable to finalize negotiations with the most qualified firm, the PM will terminate negotiations with the firm and begin negotiations with the next most highly qualified firm, and so on, until an agreement is reached.
14. Once the PM finalizes negotiations, the PM adds their project specific information to the boiler and returns the Draft Agreement to PWC for review in **Microsoft Word** format and must include the completion of all data fields in the boiler as well as:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule (Not applicable to As-Needed contracts).

Only the boiler obtained from PWC shall be used. **The Consultant does not sign the Agreement at this stage of the process but the PM should review any exhibits provided by the selected consultant for accuracy.** Incomplete Draft Agreements will be returned to the PM. After PWC reviews the Draft Agreement, the project manager shall forward the draft to their department's Deputy City Attorney for review. Once this review process is complete, the project manager can forward four (4) PDF or hard copies of the Agreement to the Consultant for final signature.

15. The PM may start the routing of their award document (Form E-PA 2625 or E-1544) at this time. At this time the PM should also update their Purchase Requisition to include the name of the selected Consultant and the Contract Number for the project. The Contract Number should be typed into the "Texts" field.

Note 1: Form E-PA 2625 (for CIP funded contracts) or Form E-1544 (for non CIP funded contracts) are generally used. However, **for non CIP funded contracts**, if the selected Consultant has been awarded more than \$250K in contracts or amendments in the current fiscal year (including the current award), City Council approval (via E-1472) will be required in order to award the contract. **For CIP funded contracts** the current fiscal year award threshold is \$1 million (including the current award) before an E-1472 is required for contract award. If your contract is partially or fully Operations & Maintenance (O&M) funded, please contact PWC for additional instructions.

Note 2: If you discover that an E-1472 is required to award your contract please STOP using this procedure summary and contact PWC to request the procedure for awarding a contract via an E-1472. DO NOT continue following the remainder of the steps below.

16. Once the Contracts and insurance are returned to the PM by the Consultant and the award document has been approved by the Comptroller and EOCP and sent to PWC's queue in SIRE, the PM will forward the four original wet signature copies of the Agreement, a copy of Comptroller's Certificate and all insurance documentation to PWC for review.
17. PWC reviews the award document in SIRE (PA 2625 or 1544), Comptroller's Certificate, Contracts, insurance and endorsements, signs the Contracts, approves the action in SIRE, and then forwards the package to the City Attorney's Office for final signature.
18. The City Attorney's Office reviews the Contracts and insurance. If all is acceptable, the Attorney's Office signs the Contracts, approves the action in SIRE, and notifies PWC when ready for pick up.

19. PWC issues a Notice to Proceed (NTP), retains one Duplicate Original Contract for their file, forwards a Duplicate Original Contract to the Consultant along with the NTP letter, and forwards a Duplicate Original Contract and a copy of the NTP letter to the PM. A Duplicate Original Contract and a copy of the NTP letter is provided to additional City staff as requested.
20. PWC assigns a SAP Outline Agreement number at this time. PM generates a Purchase Requisition (PR) for the Agreement or each Task Order, as applicable, and PWC assigns a Purchase Order (PO) number.